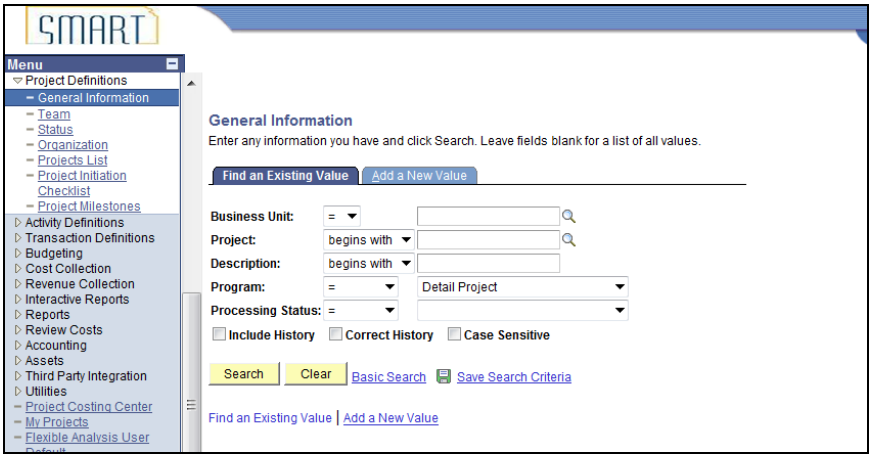
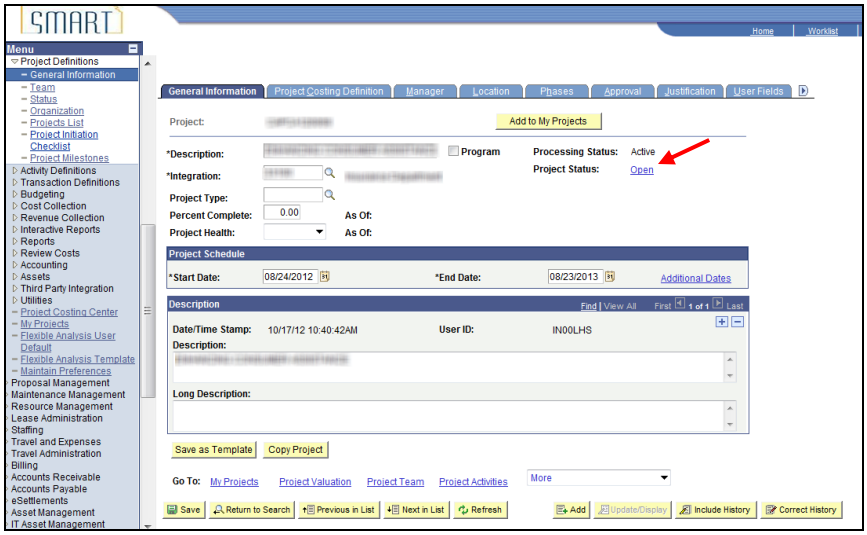
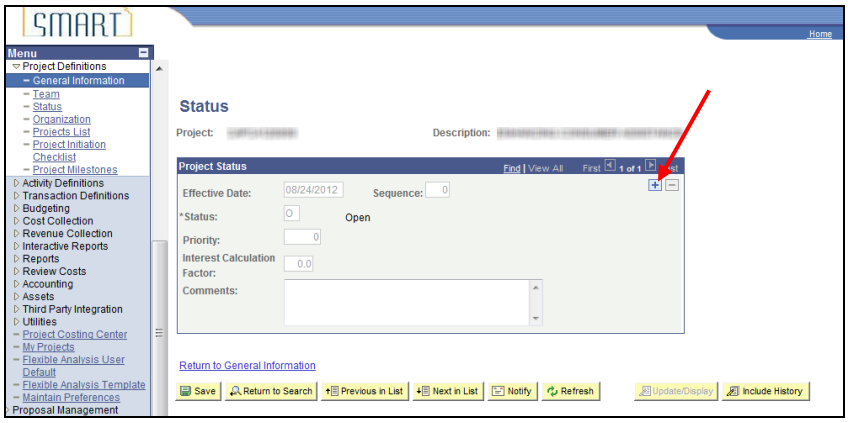
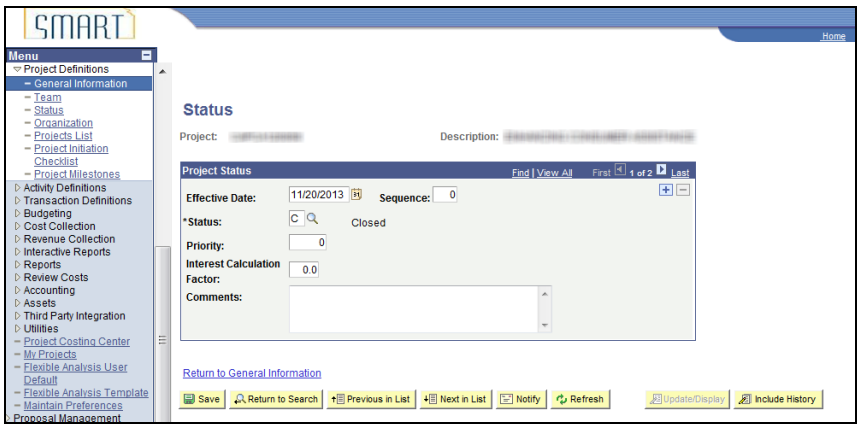
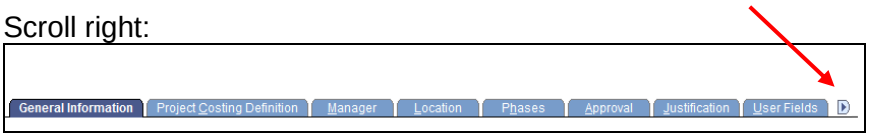
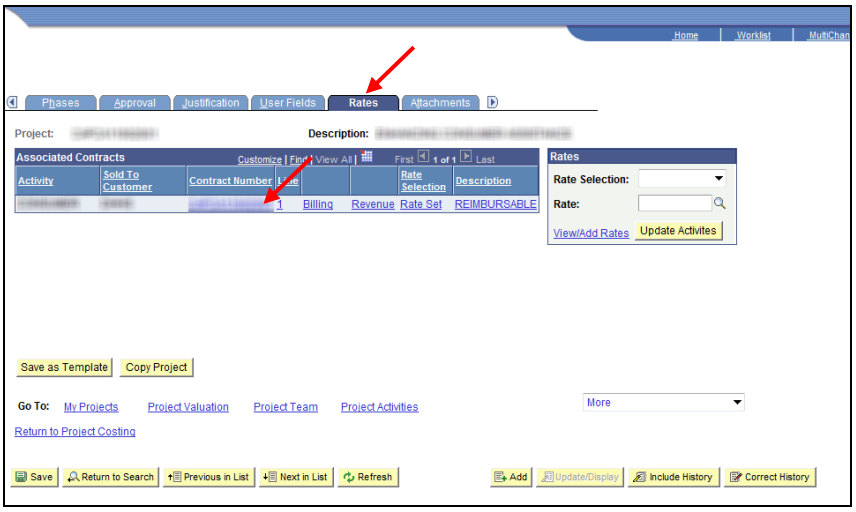
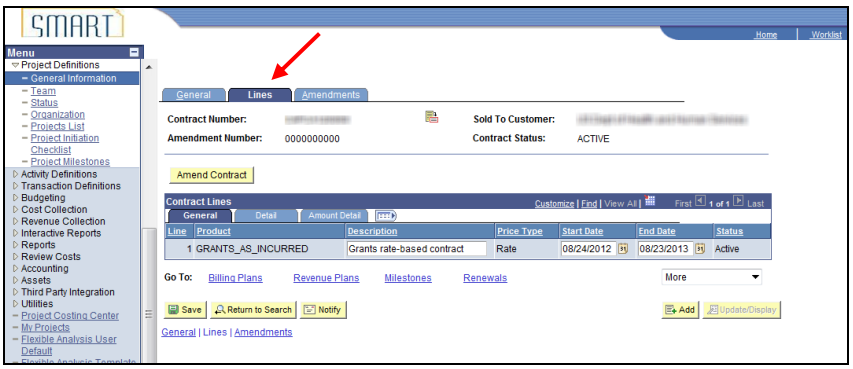
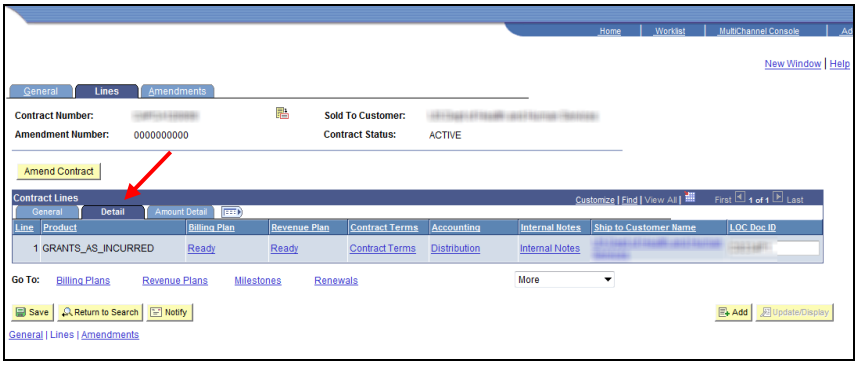
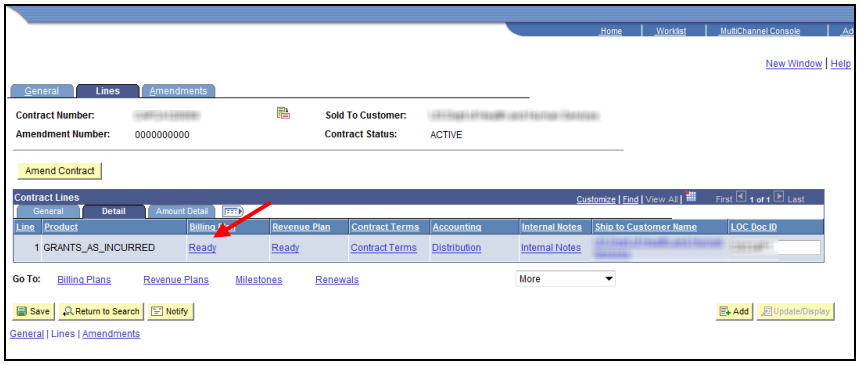
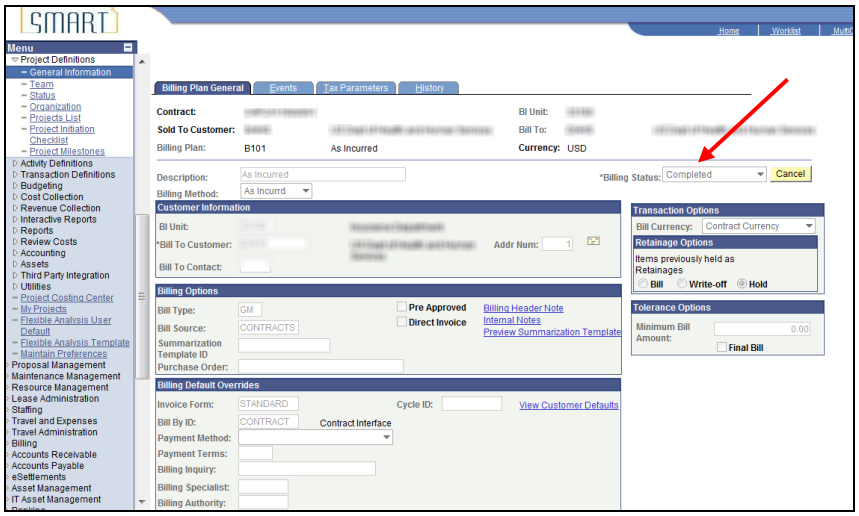
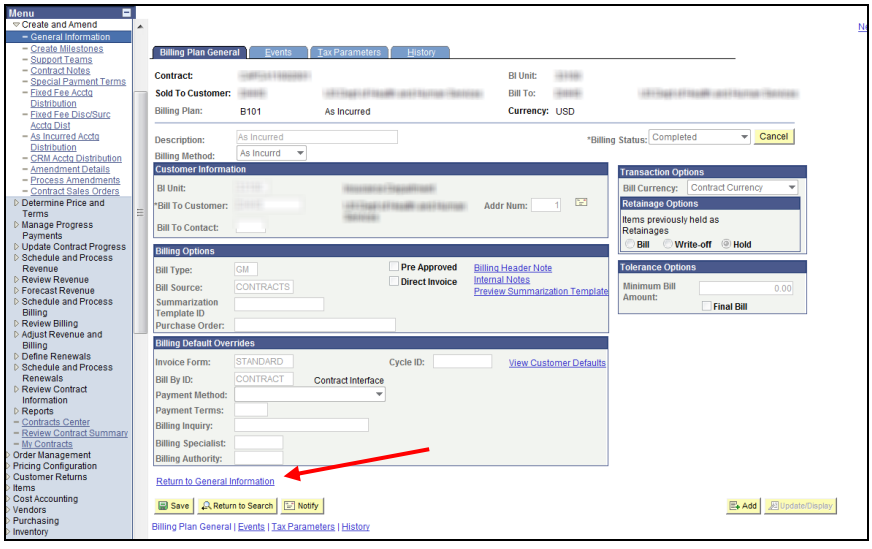
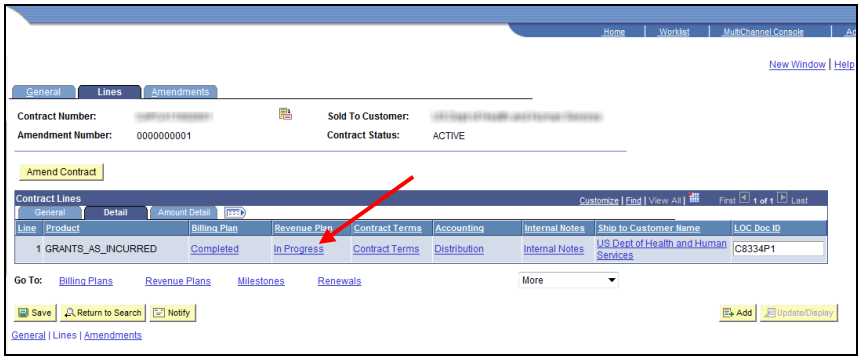
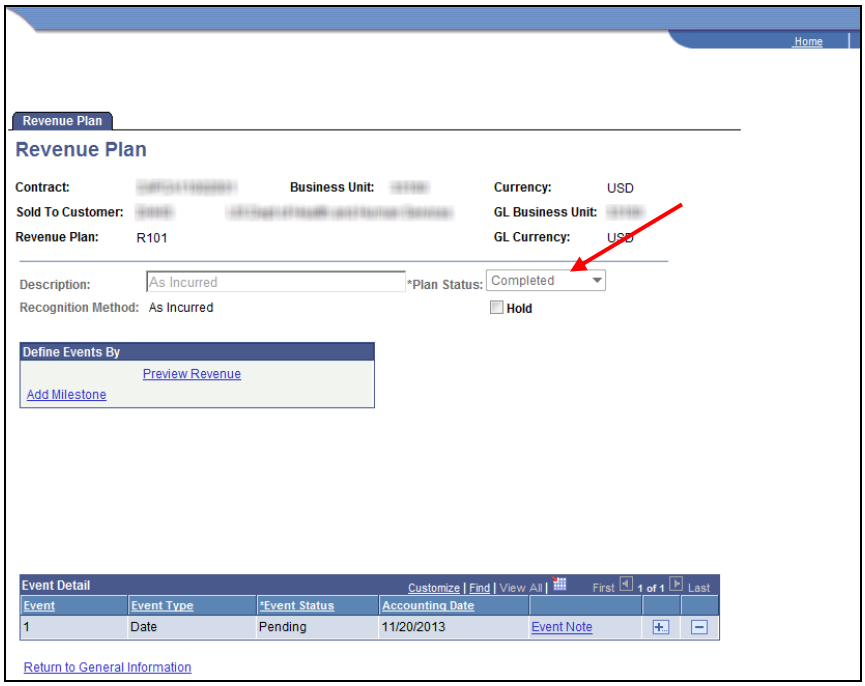
State of Kansas
Closing a Grant
Statewide Management, Accounting and Reporting Tool

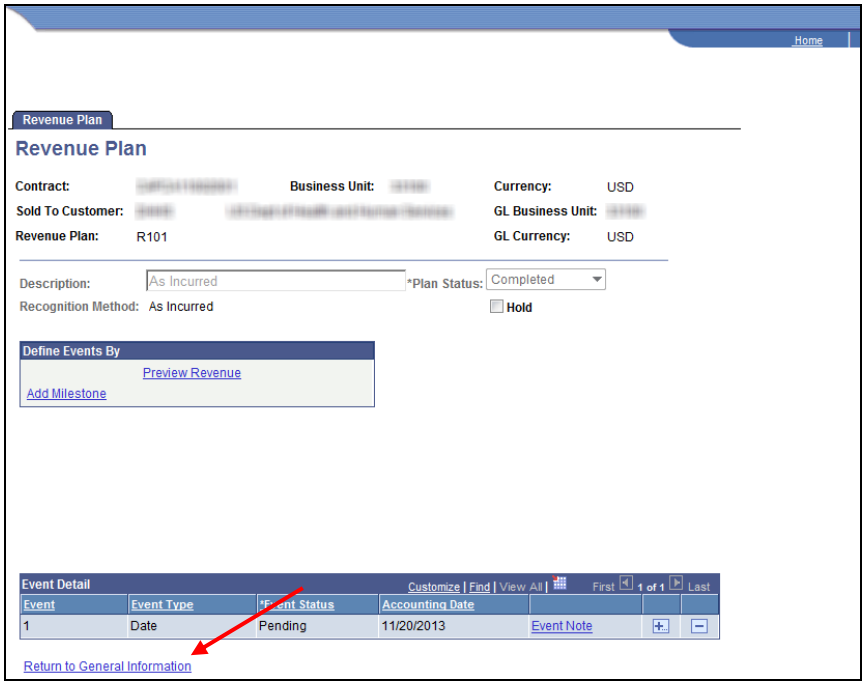
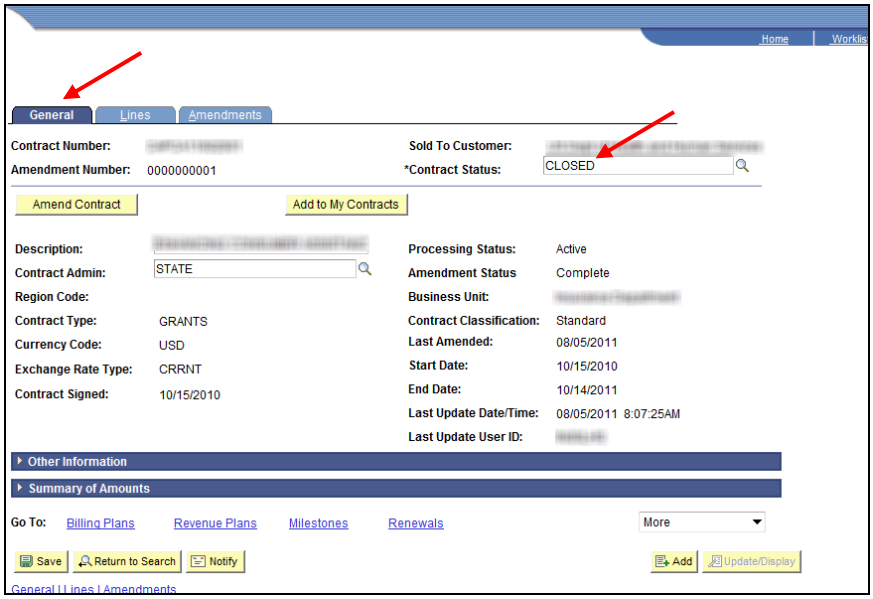
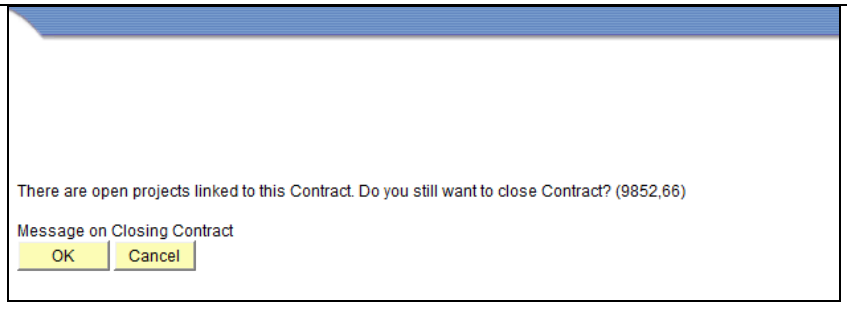
Date Created:	11/20/2013
Version:	1.0
Reason for Job aid:	This job aid describes how to close a grant in SMART. This is a multi-step process that involves coordinating inactivating data that resides in 3 separate modules in SMART: Project Costing, Customer Contracts and Grants. The process should occur in the following order: 1. **Close the project and activities** in Project Costing to prevent any new transactions from being created. 2. **Set the billing/revenue plans to "completed"** on the customer contract so no more reimbursement processing will occur. Make sure all billable transactions have been billed. Then, **set the contract status to "closed"** in the Customer Contracts module. 3. **Close the award** in the Grants module. Users must have these 3 roles in order to complete the end-to-end process: **Agency Projects Manager** **Agency Customer Contracts Manager** **Agency Grants Manager**
1.	Close the Project and associated Activities. Navigate to: Project Costing > Project Definitions > General Information	Enter for the Project ID you wish to close in the "**Project**" field and click the **Search** button: 

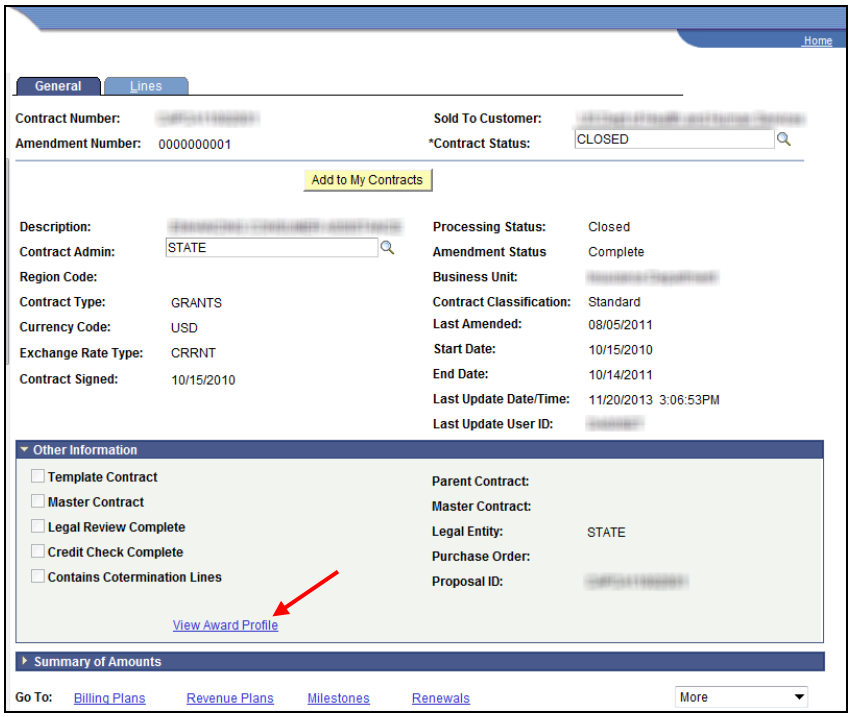
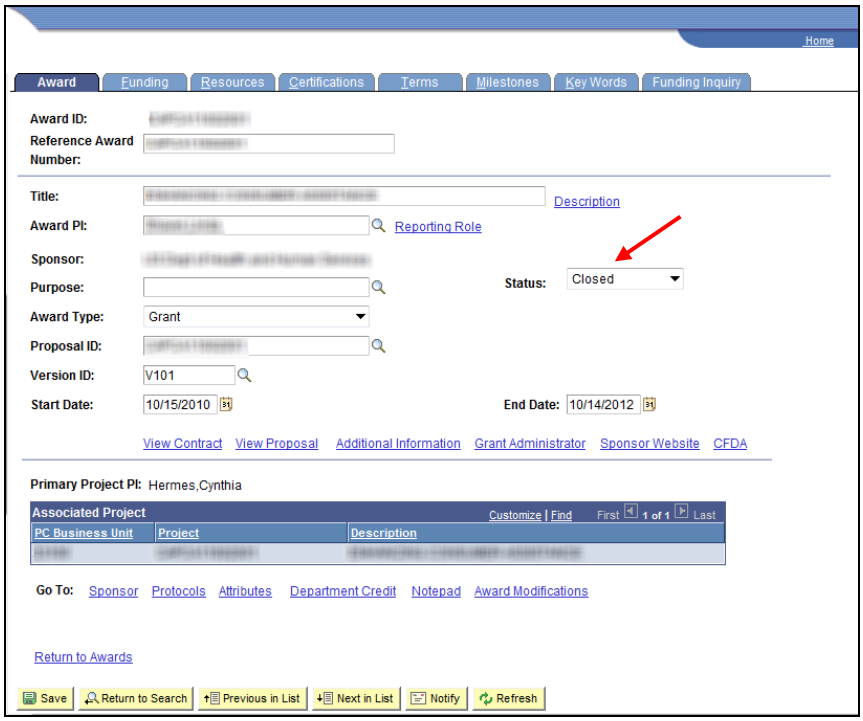
2.	From the project "**General Information**" tab, click the "**Project Status**" link to access the **Status** page.	
3.	On the **Status** page, click the **+** button to add a new effective-dated status row.	
4.	Enter the following field data, then click **Save**: • **Effective Date** = date of the project closure • **Status** = C (Closed)	

5.	Set the Billing and Revenue Plans to “Completed” on the Customer Contract. Navigate to: Customer Contracts > Create and Amend > General Information, and enter the contract number you wish to close in the “**Contract**” field and click the **Search** button Or, as shown at right, use the arrow button to scroll to the right for additional project tabs and click on the “**Rates**” tab. Then, click the link to the contract number.	Scroll right:  Rates tab: 
6.	Click the “**Lines**” tab on the contract.	
7.	Click the “**Detail**” tab from the contract Lines tab.	

8.	Click the “**Ready**” link underneath the “**Billing Plan**” heading.	
9.	From the “**Billing Plan General**” tab, change the **Billing Status** drop-down to “**Completed**” and click **Save**.	
10.	Click the “**Return to General Information**” link at the bottom of the page.	

11.	Click on the “**Detail**” tab again. Then click the “**Ready**” link underneath the “**Revenue Plan**” heading.	
12.	From the “**Revenue Plan**” tab, change the **Plan Status** drop-down to “**Completed**” and click **Save**.	

13.	Click the "**Return to General Information**" link at the bottom of the page.	
14.	Click the contract "**General**" tab, then update the "**Contract Status**" field to "**CLOSED**". Click **Save**.	
15.	You may receive a warning message that there are open projects linked to the contract. Either click "**Cancel**" and complete Steps 1-4 for all projects attached to the contract, or click "**OK**" to proceed with the contract closure.	

16.	Close the Grant Award. Navigate to: Grants > Awards > Award Profile, and search for the Award ID you want to close. Or, as shown at right, expand the "**Other Information**" section on the "**General**" tab of the customer contract and click the "**View Award Profile**" link.	
17.	On the "**Award**" tab, change the "**Status**" drop-down value to "**Closed**" and click **Save**.